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OpenText Legal Hold

Drive error-free, efficient and defensible legal hold and preservation tasks, harnessing the power of automation and the cloud

Minimize risk and eliminate costly mistakes with proven, defensible legal hold technology used in 45+ countries

Increase efficiency with automation

Apply expert workflows designed to meet specific legal requirements

Reduce costs with cloud deployment, elimination of IT CapEx and flat-fee licenses

OpenText™ Legal Hold reduces the complexity and pain of legal holds and data preservation efforts. It automates interrelated hold, preservation and collection activities to drive greater efficiency and control over data for legal, HR, compliance and IT teams.

Organizations can close the inefficiency gap between legal and IT departments—along with the risk of error-prone, manual legal hold methods, including spreadsheets and emails—by automating interrelated legal hold and preservation tasks. Legal Hold provides a simple yet powerful cloud-based legal hold and preservation solution that helps legal and IT teams protect their businesses, be more efficient and automate time-consuming and risk-prone manual processes.

OpenText Legal Hold features	
Legal holds issuance and tracking	• Create and distribute hold notices in minutes • Track acknowledgements • Send automated reminders
Integration and synchronization with IT and HR systems	• Connect to corporate systems, including internal email and HR applications and Microsoft® Office 365® • Make custodian selection and legal hold issuance simple and straightforward • No agents to install or manage
Employee questionnaires	• Create and manage web-based employee and custodian interviews with suggested expert questions, templates and control tracking • Notify and survey key employees to gather important information and identify relevant data sources and documents • Further the investigative process by identifying key custodians, key data sources and other involved parties • Use response analysis as part of a greater legal, security or records management strategy
Automated enterprise triggers for IT task suspension	• Automate IT task suspensions in accordance with email and data retention policies • Prevent inadvertent data spoliation • Preserve emails and files for exiting or departed employees
Expert processes	• Wizard-style screens help users and administrators quickly configure workflows and options • Highly flexible application is configurable to meet business requirements • Expert suggestions in the form of protocols, configurations and workflow to accommodate many different legal scenarios

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Legal Hold is deployed quickly through a secure cloud environment, with no hardware or software to purchase, manage and maintain. Organizations can start using it immediately for all legal hold, collection and preservation activities. It automates many key mechanics of defensible preservation and uses proven expert workflows for every stage of the process, from the inception of a hold through case closure.

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OpenText Legal Hold features contd.

Remote data collection	• Legal department users can initiate and manage data preservation actions on individual user accounts and within IT and IT security policies • Gather data remotely from custodians located anywhere in the world using agentless remote collection • Collect from email, laptops, tablets, drives, storage networks and other data sources on the corporate network • Speed access to data and compress the timeframe typically required by IT to collect data, using automated workflows • Secure data with strong encryption and digital chain-of-custody • Gather surgically or broadly • Deploy in minutes with no hardware or software to purchase or install • Collect discreetly behind the scenes, with no disruption to employees
Data control and delivery	• Promote relevant documents for review and analysis into OpenText™ Axcelerate™, OpenText™ Insight or a third-party review tool • Preserve data in a low-cost preservation repository • Archive data for retention purposes • Use collected data for an immediate investigation
Defensible tracking and audit trails	• Get complete tracking and audit trails for every action to ensure defensibility of process, from initial notices through closing the legal hold • Receive realtime updates, giving users access to immediate information and details about legal risk and related processes via a web-based dashboard
Custodian portal	• Log in to check the status of employee legal hold and preservation obligations for a single hold or across multiple holds
Data security	• Safeguard evidentiary integrity of preserved documents and data sources with encryption and digital chain-of-custody • Ensure security and privacy at all times with enforcement mechanisms that protect sensitive company information

Legal Hold for all legal matters

- **Civil actions:** Use smart preservation and efficient processes to reduce discovery costs and risk

- **Regulatory requests:** Rapidly respond to federal, state and international regulatory requests

- **Internal investigations:** Gain early insight into internal issues before they become serious legal problems

- **Labor and employment:** Manage the stressful volume and rapid pace of HR matters, preserving evidence efficiently

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